County of Santa Barbara

DEPARTMENT OF SOCIAL SERVICES
ADMINISTRATIVE DIRECTIVE

Title: Verification Process for GetCalFresh and OCTOPUS

Implementation Date: 01/01/2018

Revised Date: 01/10/2019

Number: Admin AD 18-101

DEPARTMENT WIDE IMPACT:	
AOP Support	Reviewed: Incorporate into business processes
APS/CWS	Reviewed: No known impact
CalFresh	**Reviewed: Incorporate into business processes**
CalWIN	**Reviewed: Incorporate into business processes**
CalWORKs	**Reviewed: Incorporate into business processes**
Document Imaging	**Reviewed: Incorporate into business processes**
Fiscal	Reviewed: No known impact
Foster Care	Reviewed: No known impact
General Relief	**Reviewed: Incorporate into business processes**
Hearings/Collections/IEVS	**Reviewed: Incorporate into business processes**
IHSS	Reviewed: No known impact
Medi-Cal	**Reviewed: Incorporate into business processes**
Staff Development	**Reviewed: Incorporate in training module**
Stockroom	Reviewed: No known impact
Systems	**Reviewed: Incorporate into business processes**

FILING INSTRUCTIONS:
Administrative Directives, Miscellaneous

PROGRAM ANALYST REFERENCE:
CalWIN Strategic and Program Initiatives Meeting

Background

As part of the Department of Social Services global "No Wrong Door" policy, two new options for clients to inquire on their case and submit verification documents online have been added:

- The documents portal on the **GetCalFresh** website, and
- The **OCTOPUS** portal on the County DSS website.

As before, clients may also choose to inquire on their benefits and/or submit verifications via an in-person visit, fax, mail, utilizing the Automated CalWIN Client Entry to Social Services (ACCESS) automated phone line, or the MyBenefits CalWIN (MyBCW) portal.

Unlike MyBCW, GetCalFresh and OCTOPUS do not require clients to create an account, and they do not require the user to download an app for mobile use.

This Administrative Directive (AD) was developed to provide staff with instructions, policy, and procedures for verifications received through GetCalFresh and OCTOPUS.

GetCalFresh

GetCalFresh is a free non-profit service that provides California residents with a secure, simplified, mobile-friendly online application for CalFresh benefits, with live support available by chat in English or Spanish. The application, together with any attached verifications, is sent through an interface to MyBCW.

GetCalFresh also includes a documents portal, which allows users to send additional verifications *after* their application has been sent. The destination office is automatically selected based on the user's zip code, and the verifications are routed to the Outlook ACCESS public folder inbox for that office. GetCalFresh is intended for CalFresh only.

OCTOPUS

OCTOPUS is a secure, mobile-friendly, web-based form on our DSS public website that allows clients to send us verifications for *any* eligibility program, or to make inquiries about their application or case. The user selects the destination office, and the message and documents are routed to the Outlook ACCESS public folder inbox for that office.

Policy

Inquiries and/or verifications received through either new method should follow the same regulations/business processes for each respective program as those received via mail or in person. Inquiries and verifications from these two new methods will be received by the ACCESS public folders in Outlook. The ACCESS public folder inboxes are reviewed daily by Administrative Office Professional (AOP) staff. AOP staff shall follow existing regulations/ business processes for each respective program for receiving verifications from clients. Staff will continue to follow PCI guidelines while processing verifications or inquiries received through the ACCESS public folder inboxes. Refer to MEDS Confidentiality Policy Admin AD 07-04 http://dsshome/calwin/ADnew/Admin/MEDS/ADMIN_AD_07-04.pdf

NOTE: While we are still working on an email business process/protocol for use between staff and clients, staff should not reply to clients via email. Staff should respond to clients via phone or in writing as is currently practiced. This may change in the future.

Procedures

GetCalFresh

Clients can submit documents following submission of a CalFresh application or for an existing CalFresh case. Documents submitted after the client has submitted an application (orphan docs) will not be transmitted through MyBCW; instead they will be sent to the ACCESS Inbox for district office corresponding to the user's zip code.

Here is how the client can submit a document using GetCalFresh:

- Client visits getcalfresh.org/docs, or[1]
- Client visits getcalfresh.org and clicks on the "Submit documents" button[2]

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[1] Full URL: https://www.getcalfresh.org/docs

[2] Full URL: https://www.getcalfresh.org/
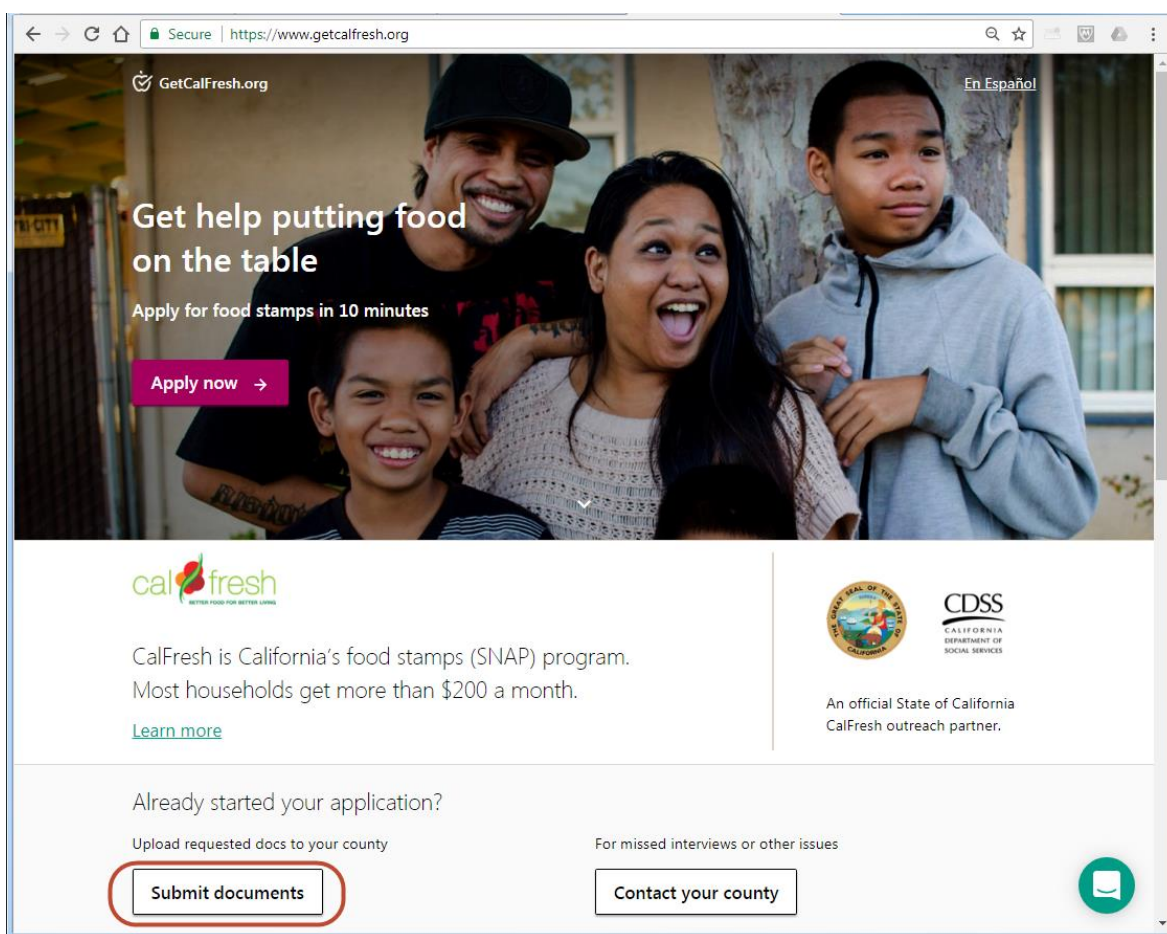
- Client selects Santa Barbara County from the drop-down menu, and clicks the Go button.

Securely send documents to your county.

You can upload them from your computer or take a picture using your smartphone's camera.

Select your county ▼ | Go

- Client completes a page of fields including first name, last name, birthday, social security number (optional), phone number, email address, and case number (optional), and clicks the Continue button.

Before starting, we need to match your documents to your case.

What is your first name?

What is your last name?

What is your birthday?

Month ▼ | Day ▼ | Year ▼

What is your social security number?
(if you have one)

What is your phone number?

We will text message you if we have any problems opening your documents.

What's the best e-mail address for you?

What is your case number?

(if you have one)

This is different from application confirmation number.

Where can I find this? >

Continue →

- Client indicates Yes or No if they know what verifications they need to submit. If they select No, a tool opens that helps them clarify what verifications are needed (based on type and source of income, employment status, citizenship status, age, disability, expenses for child care / dependent care / child support, and college student status). We will assume the client has either clicked Yes or used the tool to determine what verifications to submit.

Do you know what proof you need to submit?

If not, we can help you figure out what to submit.

✓ Yes   ✗ No

- Client chooses desired file, chooses which kind of verification it is from the drop-down, and clicks the Upload button.

Upload A Document

Upload your ID and any other documents that you have been asked to upload.

Choose File | No file chosen

What kind of document is this?

Choose a type ▾

Upload | Cancel

- An interim confirmation appears that lets them either upload another document, or indicate that they are done uploading documents and continue.

Upload Your Documents

Upload your ID and any other documents that you have been asked to upload.

CDL.jpg
Type: Identification
Delete

Add another document

Done uploading documents

- A confirmation page appears letting the client know what to expect next. If the client provided phone and/or email contact info, they will also automatically receive a confirmation message via email and/or text shortly after, when the documents are received in our inbox.
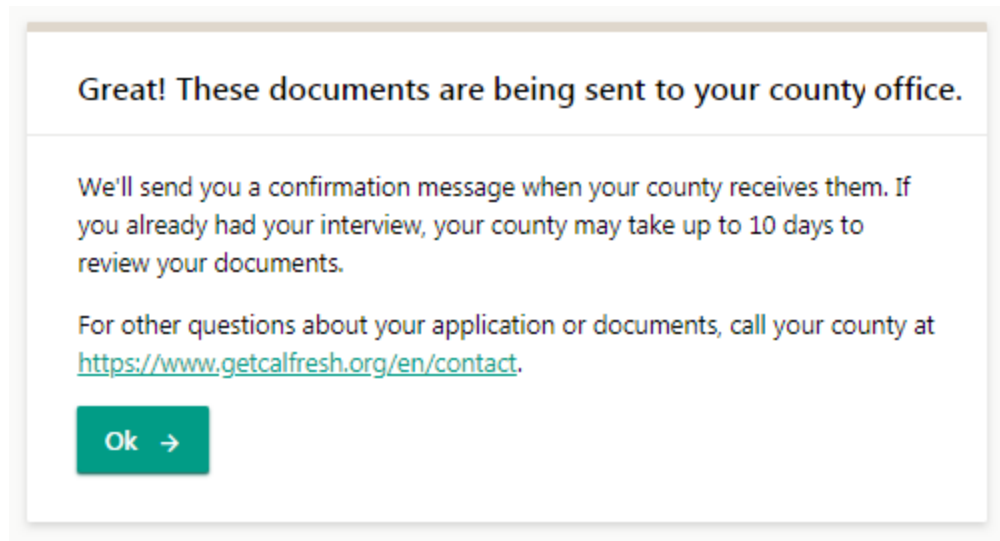
The verifications are delivered to the DSS Outlook ACCESS public folder inbox corresponding to the client's zip code. The message looks like this when received:
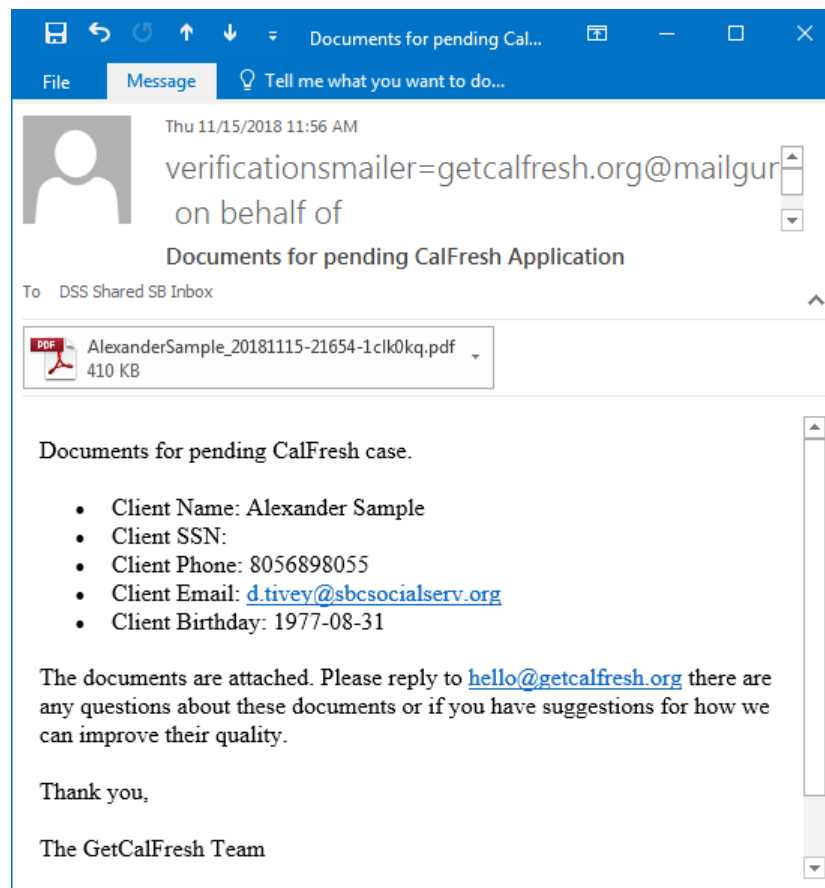
OCTOPUS

OCTOPUS lets clients/applicants submit documents for any program or make general inquiries about their application/case.

To access OCTOPUS, staff can direct clients to either:

- go to DSSoctopus.com (or DSSpulpo.com for the Spanish form),[3] or

- go to the Santa Barbara County DSS website (sbcDSS.org) and click one of the "submit documents" links, as shown below:[4]

  - On the Home page, under the "What would you like to do?" headline, click the "Submit verification documents online" link. Or

  - In the left-hand navigation menu, expand "How Do I…" and click the "Submit documents" link. Or
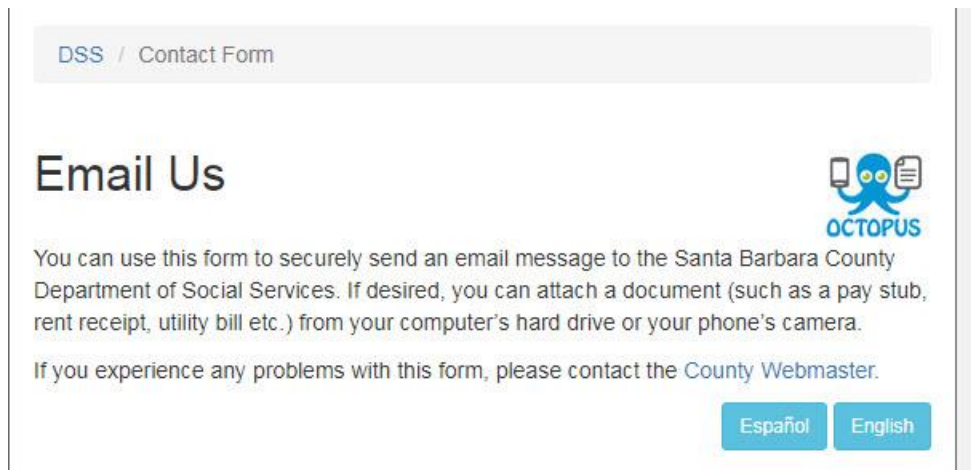
  - On the Contact Us page, under the "To inquire about your application or case" headline on the "To submit verification documents" line, click the Octopus link.

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[3] DSSoctopus.com auto-redirects to the full English Octopus URL, https://secure.countyofsb.org/dss/octopus
DSSpulpo.com auto-redirects to the full Spanish Octopus URL, https://secure.countyofsb.org/dss/octopus/es

[4] sbcDSS.org auto-redirects to the full SB County DSS website URL, www.countyofsb.org/DSS.

- The Octopus page loads. It begins with an explanatory blurb, as shown below. The user can use the blue buttons to switch between English and Spanish.

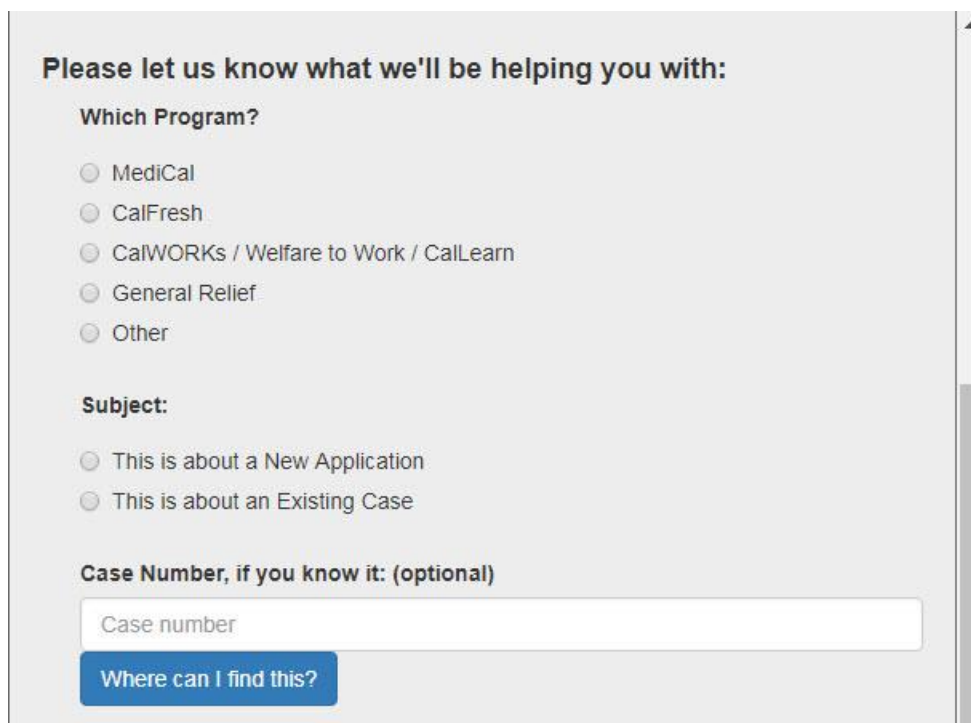- The form fields appear below. All fields are mandatory, except Case Number.

- The user enters a few details about their case or application.

NOTE: If the user is unsure of their case number, they can click the blue "Where can I find this?" button for an image showing where to find the case number on their client correspondence or EBT card.

- The user enters a few details to identify themselves, and how they can be reached.

- The user types their message, and clicks Yes or No to indicate if they want to attach a document(s). If they click Yes, a "Please attach documents" section appears--including a blue Browse button to select the document(s), and tips on uploading documents.

Please type your message below:

Message:

> Enter your message

Would you like to send us any documents?

- ◉ Yes
- ○ No

Please attach documents:

Please only send images (photos) or PDF documents.

[Browse...]

If you need to send us a photo or other document, you can attach it or take a picture of it with your phone here. Please only upload image files (jpeg, png, gif, bmp) or PDF documents.

Need to upload more than one file or photo?
Hold down the ctrl key (cmd key on a Mac) and click the files you wish to send. All files must be in the same folder.
On a phone, take your photos first, then click the blue Browse button above and select all the photos desired from your photo library.

The maximum file upload size is 30 MB.

- The user chooses which office they want to send to.

Please let us know where to send this message:
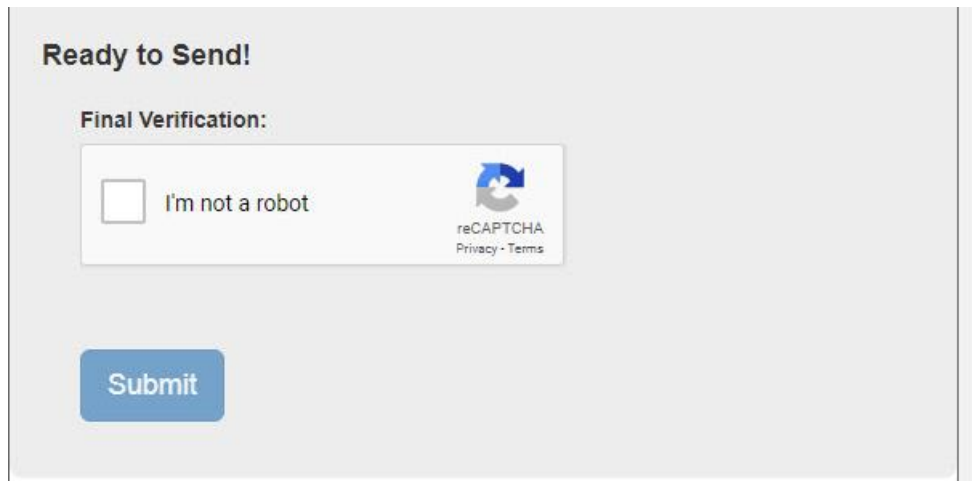
Send this message to:

- ◉ Benefit Service Center
- ○ Santa Barbara main office
- ○ Lompoc main office
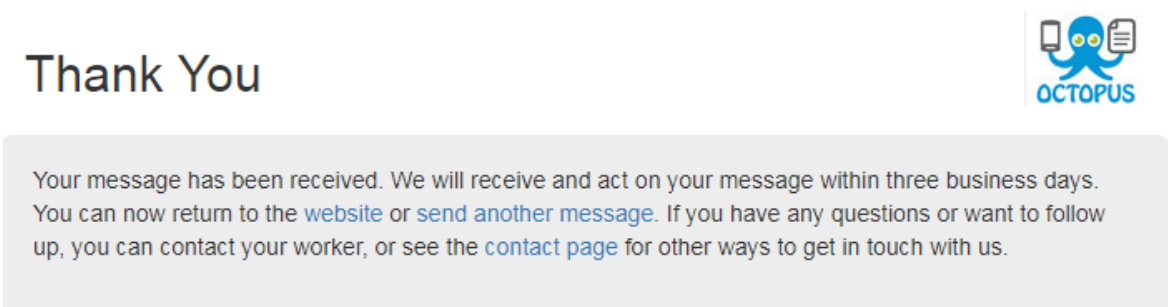- ○ Santa Maria main office (Betteravia / Centerpointe)
- ○ Santa Maria Self-Sufficiency office (Broadway)

- The user checks the CAPTCHA box to prove they're not a robot, and clicks the blue Submit button. (Note: checking the CAPTCHA box will occasionally prompt a "challenge," such as making the user select which of several photos have street signs in them, to help us prevent spam.)

Ready to Send!

Final Verification:

I'm not a robot
reCAPTCHA
Privacy - Terms

Submit

- A confirmation page appears, telling the user what to expect next.

Thank You

OCTOPUS

Your message has been received. We will receive and act on your message within three business days. You can now return to the website or send another message. If you have any questions or want to follow up, you can contact your worker, or see the contact page for other ways to get in touch with us.

The message and attachment(s) are delivered instantly to DSS, to the ACCESS public folder inbox for the office that the user selected. The message looks like this when received:
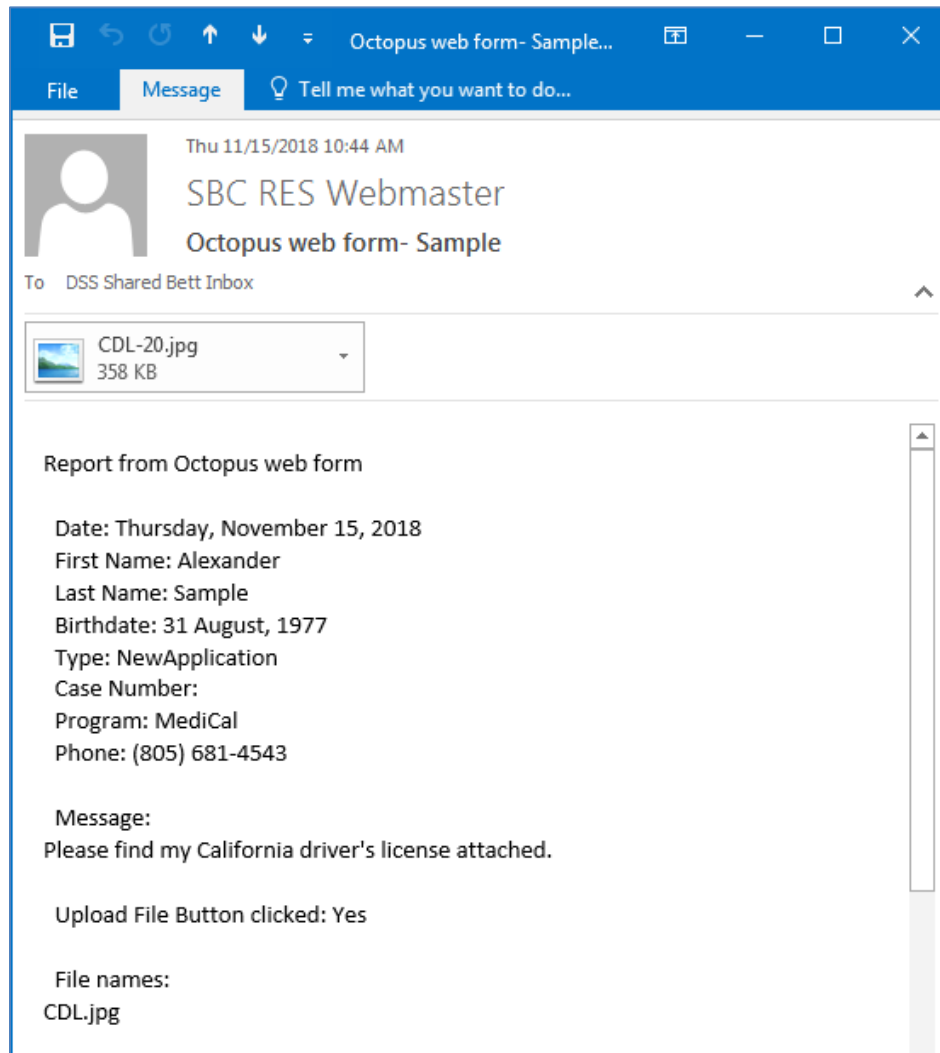
Processing Instructions

The AOP's at each District Office are responsible for checking the ACCESS public folder inboxes throughout the day. The ACCESS public folders are:

- DSS ACCESS LO Inbox
- DSS ACCESS SB Inbox
- DSS ACCESS Bett Inbox
- DSS ACCESS WRC Inbox
- DSS ACCESS BSC Inbox

Note: In addition to verifications and documents from GetCalFresh and OCTOPUS, staff may receive emails regarding the following in the ACCESS Inboxes:

- ACCESS phone line messages
- BCW App

AOP Responsibilities

- Retrieve any documents found in these inboxes and follow current processing business processes.
- Scan into DocStar and send an email to the appropriate office/EW.
- Take immediate action on any email in these inboxes following current business processes.

AOP staff will monitor and forward the incoming e-mails and verifications from these inboxes (as they do with the MyBCW and e-ICT documents) to the appropriate District Office Inbox or staff. Each office should handle the email like any other message received from a client including the standard procedure of entering case comments. Any documents received with the email can be imported directly into DocStar system as described below:

- If known to CalWIN – File in the documents with the Case # in DocStar following regular filing procedures and enter "email" in the KEYWORDS section.
- If unknown to CalWIN – Follow office procedures for unidentified documents.

EW Responsibilites

Staff is encouraged to inform clients of these new options for submitting verifications online. These options can facilitate the process of obtaining verifications from clients—making a more efficient process for staff and clients, especially when client benefits could be negatively impacted if verifications are not received timely.

The EW must read the "message" portion of the email to be sure they understand the action(s) the client wants taken. The EW must contact the client if the client is requesting a call back, or if follow-up is called for. (For example, if the EW is unable to read or open the document attached to the forwarded email, or if the client mentions two attached documents in their message but only attached one document.)

The EW is responsible for taking appropriate actions on any verifications or emails received from the client. EW's will still need to follow the appropriate program regulations and timeframes for requesting verification or missing information from the client. A needs letter will still need to be sent out requesting verifications or missing information unless the client provides and the EW receives the information immediately. The EW will need to case comment that the client provided verification via OCTOPUS or GetCalFresh as they would when they receive verifications via mail or client brings into the office.